RollCall-Pro Basic
Installation and Setup Manual

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RollCall-Pro Basic Version 3.1a

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1 Purpose of this Manual

The purpose of this **Installation & Setup Manual** is to assist in the configuration of the system before using it in a meeting. It is not written specifically for an information technology professional, but the information it presents is useful for someone with this background, who might have the responsibility of installing and configuring RollCall-Pro.

There is a separate **Operator's Manual** which is designed to assist the person who will actually operate the RollCall-Pro system in a meeting.

You should also become familiar with the **SideKeys User Manual** that came with this System. This manual provides valuable information regarding the setup, maintenance and trouble shooting of the wireless keypad system.

2 RollCall-Pro Installation

Normally this software is installed on a single PC or laptop computer that is usually situated in a board/council chamber. The RollCall-Pro System could also be setup on a network computer that is then accessed through any room with a computer that has a network connection to the central server where the program was installed. The following instructions assume a normal PC or laptop installation, but where a network install would differ, the network installation differences will be noted — the major difference being where you install the software and where you save the Results.

Note: To install onto the network, you must install the CD onto the network server computer, BUT the RollCall-Pro USB SideKeys receiver must be installed on the local PC in board/council chamber in order for the keypads to work correctly.

2.1 System Requirements

Minimum system requirements to run RollCall-Pro include the following:

- Pentium III Processor
- Microsoft Windows 2000 and up
- CD-ROM drive and USB port
- RollCall-Pro Hardware (USB SideKeys Receiver and Keypads)

The RollCall-Pro Setup installs all of its files on the drive where the Windows operating system is installed. The default directory is "C:\RollCall-Pro\".

Note: RollCall-Pro is designed to operate under 1024 X 768 resolution.

2.2 System Software

To install the RollCall-Pro software:

1. Load the RollCall-Pro System CD into the CD-ROM of the computer.

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2. The program is not designed to automatically Startup. You must navigate to the CD and to the Install Directory on it.

3. In the D:/Install Directory (assuming that "D" is the CD-ROM drive), you will see a file called "setupRollCallProBasic30.exe". Double-click on this icon and the installation program will start and guide you through the rest of the installation. Follow the onscreen instructions.

Depending on whether you've chosen (in Windows Explorer) to view Icons or Tiles or List or Details, you'll see a "Setup icon" like one of these:

Figure 2-1. RollCall-Pro Setup Icons

The Welcome Screen is the first window you will encounter after you have started the RollCall-Pro System installation:

RollCall-Pro Basic (Version 3.0) - InstallShield Wizard
Welcome to the InstallShield Wizard for RollCall-Pro Basic (Version 3.0)
The InstallShield(R) Wizard will install RollCall-Pro Basic (Version 3.0) on your computer. To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
< Back
Next >
Cancel

Figure 2-2. Welcome Screen

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4. Click on "Next" to continue.

The next RollCall-Pro Software installation screen is the Software License Agreement:

RollCall-Pro Basic (Version 3.0) - InstallShield Wizard
License Agreement
Please read the following license agreement carefully.
END USER LICENSE AGREEMENT FOR ROLLCALL-PRO:
IMPORTANT-READ CAREFULLY: This RollCall-Pro End-User License Agreement ("EULA") is a legal agreement between you (either an individual person or a single legal entity, who will be referred to in this EULA as "You") and Current Works, Inc. for the RollCall-Pro software product that accompanies this EULA, including any associated media, printed materials and electronic documentation (the "Software Product"). The Software
I accept the terms in the license agreement
I do not accept the terms in the license agreement
InstallShield
< Back
Next >
Cancel

Figure 2-3. Software License Agreement

5. Carefully read this agreement and when you are finished reading and willing to accept the agreement, click on the "I accept….." button and then "Next" to continue.

The next screen is a "Read Me" file of information about this latest version of the software. It contains useful information about the system requirements, customer notes and planned upgrades of the RollCall-Pro software program:

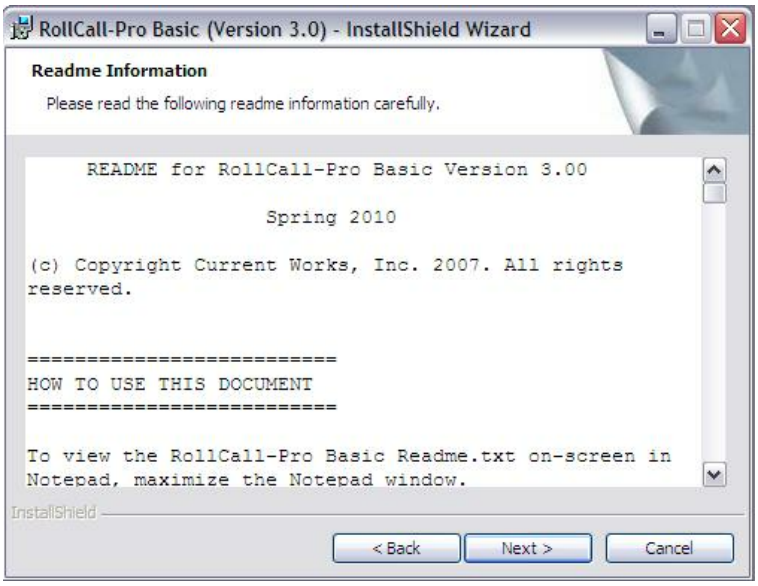
RollCall-Pro Basic (Version 3.0) - InstallShield Wizard
Readme Information
Please read the following readme information carefully.
README for RollCall-Pro Basic Version 3.00
Spring 2010
(c) Copyright Current Works, Inc. 2007. All rights reserved.
==========
HOW TO USE THIS DOCUMENT
==========
To view the RollCall-Pro Basic Readme.txt on-screen in Notepad, maximize the Notepad window.
InstallShield
< Back
Next >
Cancel

Figure 2-4. Read Me File

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Click "Next" to display the User Information Screen:

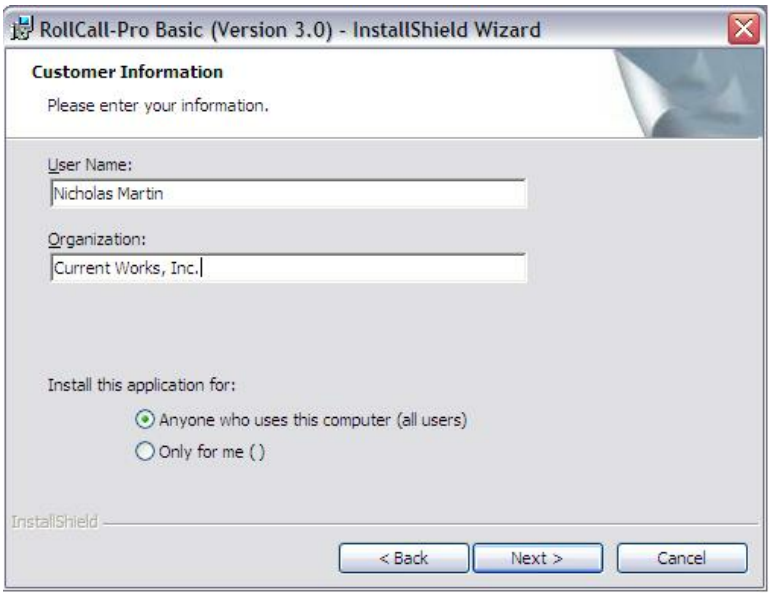

Figure 2-5. User Information

6. Enter your Name and Company/Organization. Choose "Anyone" or "Only for me".

7. Click "Next" to display the Destination Folder screen. The default Destination Folder is on the "C" hard drive of the local computer, in a Folder named "RollCall-Pro" (C:\Program Files\RollCall-Pro\). If this location is satisfactory, press "Next". If you want the program installed elsewhere, click on the "Change" button and see the following screen:

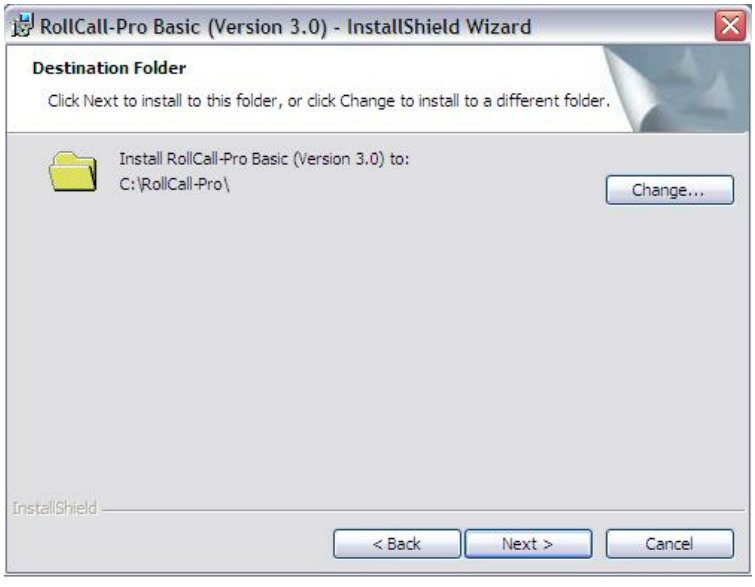
RollCall-Pro Basic (Version 3.0) - InstallShield Wizard
Destination Folder
Click Next to install to this folder, or click Change to install to a different folder.
Install RollCall-Pro Basic (Version 3.0) to:
C:\RollCall-Pro\
Change...
InstallShield
< Back
Next >
Cancel

Figure 2-6. Choose the Default Destination Directory

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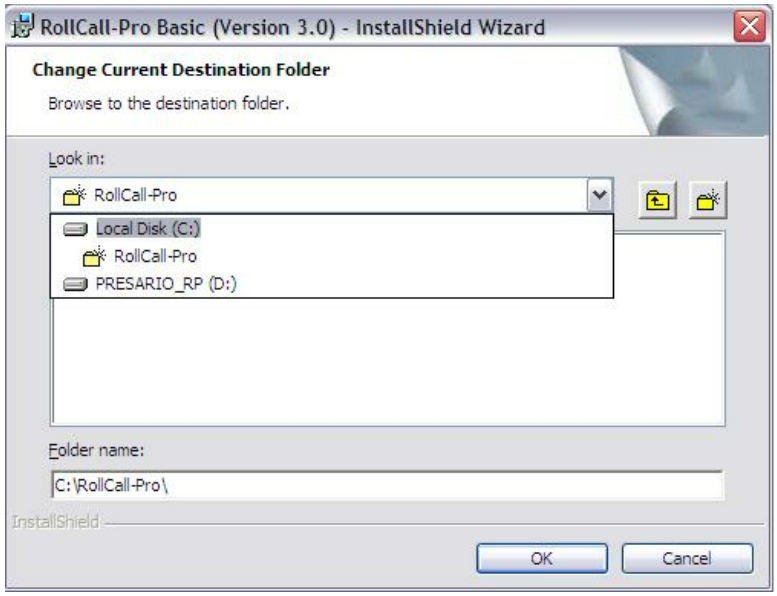

Figure 2-7. Define a Custom Destination Directory

8. It is recommended that you use the default directory.

   Also, note that a network installation will probably be "C:\RollCall-Pro\" as well, but when connecting via a local computer, the network drive will probably be "mapped" and a shortcut to the application should be created on the local computer's desktop with the mapped network drive name.

9. Click on the "Next" button to display the Ready to Install Screen, which allows you to simply verify that the information you have given so far is correct:

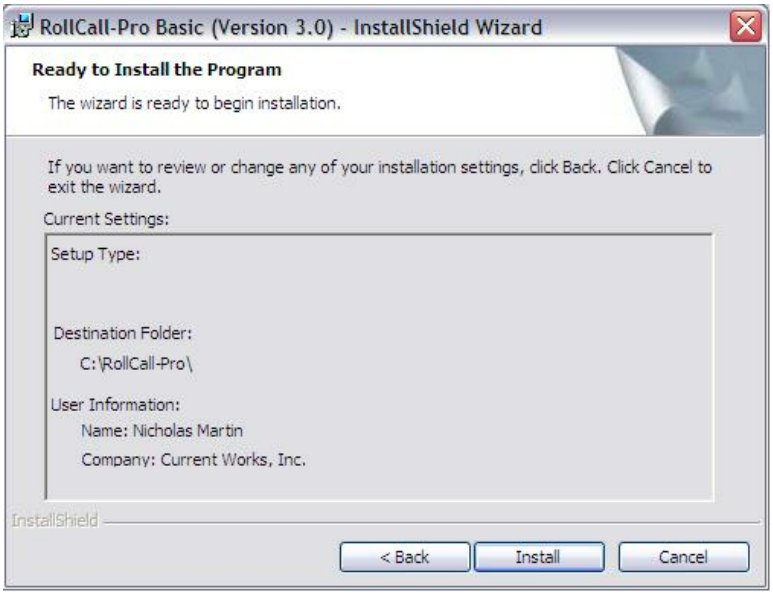
RollCall-Pro Basic (Version 3.0) - InstallShield Wizard
Ready to Install the Program
The wizard is ready to begin installation.
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.
Current Settings:
Setup Type:
Destination Folder:
C:\RollCall-Pro\
User Information:
Name: Nicholas Martin
Company: Current Works, Inc.
InstallShield
< Back
Install
Cancel

Figure 2-8. Ready to Install

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10. If everything is correct, click on the "Install" button. If anything is incorrect, click "<Back" to correct the information before proceeding.

This is the last point where the program asks for information for the installation. From this point forward, the RollCall-Pro System installation will start and will copy files to your computer.

When the installation process is complete, the Setup Complete Screen displays:

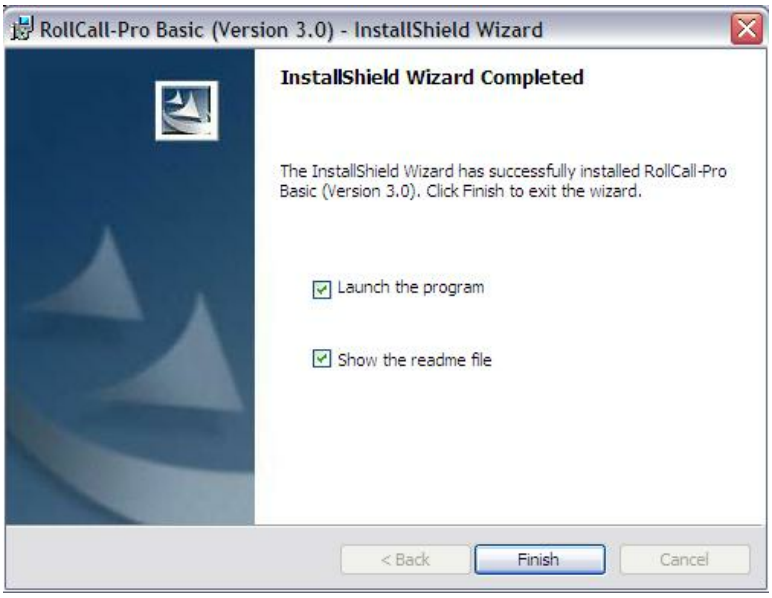
RollCall-Pro Basic (Version 3.0) - InstallShield Wizard
InstallShield Wizard Completed
The InstallShield Wizard has successfully installed RollCall-Pro Basic (Version 3.0). Click Finish to exit the wizard.
Launch the program
Show the readme file
< Back
Finish
Cancel

Figure 2-9. Setup Complete

11. The RollCall-Pro software installation is now complete and all that remains to do is to click on the "Finish" button.

Once the setup screens are gone, you will notice two icons on your desktop. One is a colorful Icon named "Shortcut to RollCall-Pro Basic".

This icon is linked directly to the RollCall-Pro software application. When you want to start up the RollCall-Pro software program, simply *double-click* on this icon.

The other icon provides a shortcut to the Roll Call-Pro Folders where, along with several other folders, the Results Folder is located:

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The Results documents are saved in the folder named "Results":

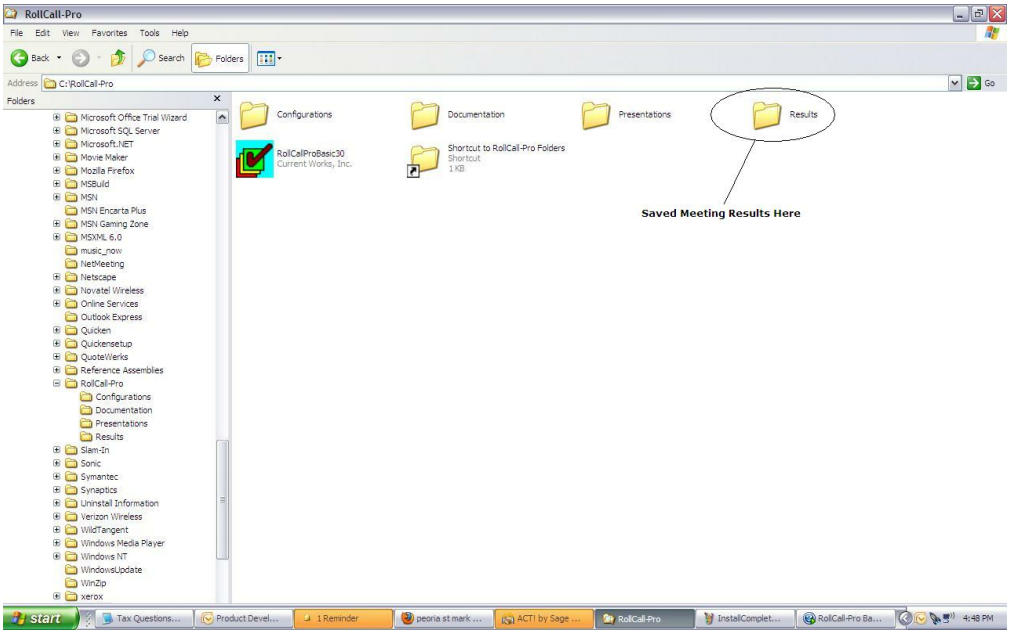

Figure 2-10. RollCall-Pro Folder

RollCall-Pro Results files in the Results folder are labeled/named by the meeting date:

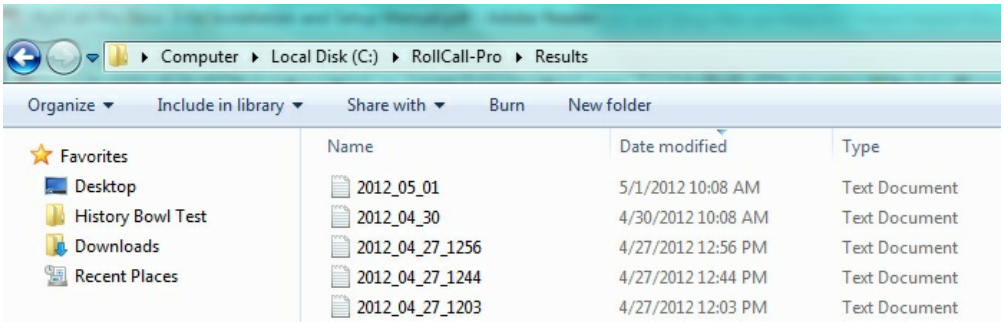

Figure 2-11. Results Folder

2.3 System Hardware

The hardware needed to complete the system includes the wireless SideKeys Keypads and the USB SideKeys RollCall-Pro Receiver.

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To connect the receiver, simply plug the USB SideKeys Receiver into a USB port on the computer. Ensure that the USB cable is securely plugged into both the USB port on the computer as well as the USB SideKeys Receiver. The first time this connection is made the computer will need to locate and assign the proper USB Drivers to the Receiver. This step could take from 5 to 30 seconds; be patient and wait for the red light to light-up on the face of the Receiver. Additional information on the SideKeys wireless keypad system is available in the SideKeys User Manual included with the system.

Note also that if you have installed the software onto a network server, the USB SideKeys Receiver hardware must be connected to the local computer, not the network server computer.

Figure 2-12. System Hardware (Keypads and Receiver)

2.4 Typical Installation

The following diagram and picture give the user an idea on how to setup the system to work in a City Council Chamber, Board Room, or any room where the system may be used. Possible scenarios are TV monitors hanging in the corners of a room, a projected display on a white wall or drop down screen, or a number of other display possibilities. The projection device can either be a portable system or a permanent hanging projector from a ceiling.

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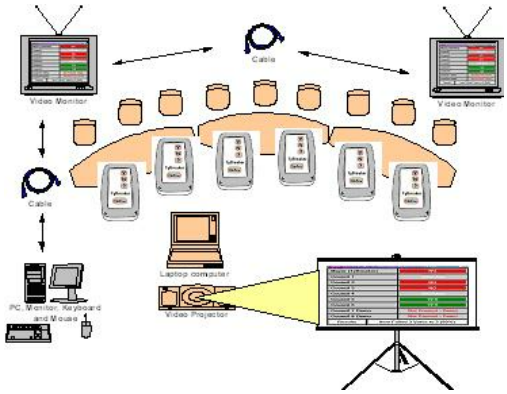

Figure 2-13. Typical Hardware Setup Diagram

Figure 2-14. Typical Installation Photo

3 Starting RollCall-Pro

Once the RollCall-Pro software is loaded properly and the SideKeys hardware is installed, the full RollCall-Pro system is ready to operate.

1. Double-click on the RollCall-Pro Shortcut icon that is on your computer desktop:

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The first screen you will see is the START window (or "Splash" screen):

Figure 2-15. Starting RollCall-Pro System

2. Click on "Start" to open the application.

3 Select any available configuration file the first time the program is opened:

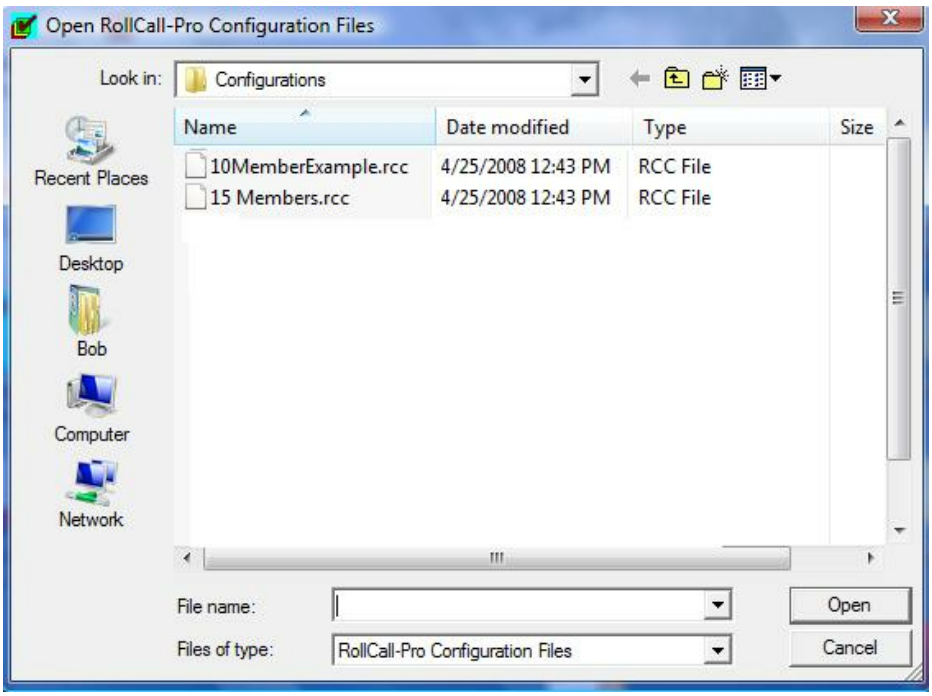

Figure 2-16. Select the Configuration you want to load

4. The Member Names contained in the RollCall-Pro configuration that you selected will appear:

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Figure 2-17. Default Settings Screen

4. At this point you can go begin using the RollCall-Pro System to experiment with the system and see how it works with this Default Setup. In this case you should read the **Operator's Manual** to see how the System would be used in a meeting.

   If you want to proceed to Configure this RollCall-Pro software for your particular Board/Council, continue on to "Setting Custom Configurations" for the specifics of creating your own customized Configuration.

4 Setting Custom Configurations

1. To change this initial configuration to your own Customized Configuration, Right Click anywhere on this initial screen. A small pop-up window displays several options.
2. Left Click in the pop-up to Select the "Hide/Unhide Tabs" option, as shown here:

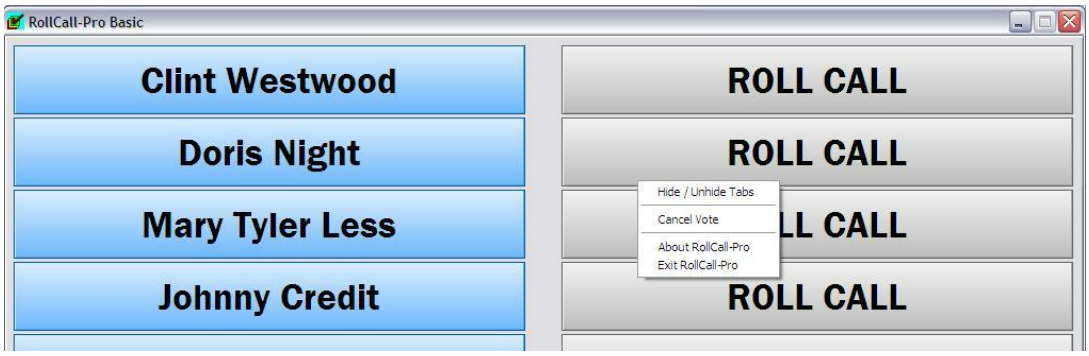

Figure 3-1. Pop-up Choice: Hide/Unhide Tabs

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3. The Function Tabs on the right side of the screen will appear, as shown below:

Figure 3-2. RollCall-Pro Display Screen with Tabs

4. To create a custom configuration for your Board/Council click on the "Setup" tab along the lower right-hand side of the screen to display several pieces of basic information that are required for RollCall-Pro Setup:

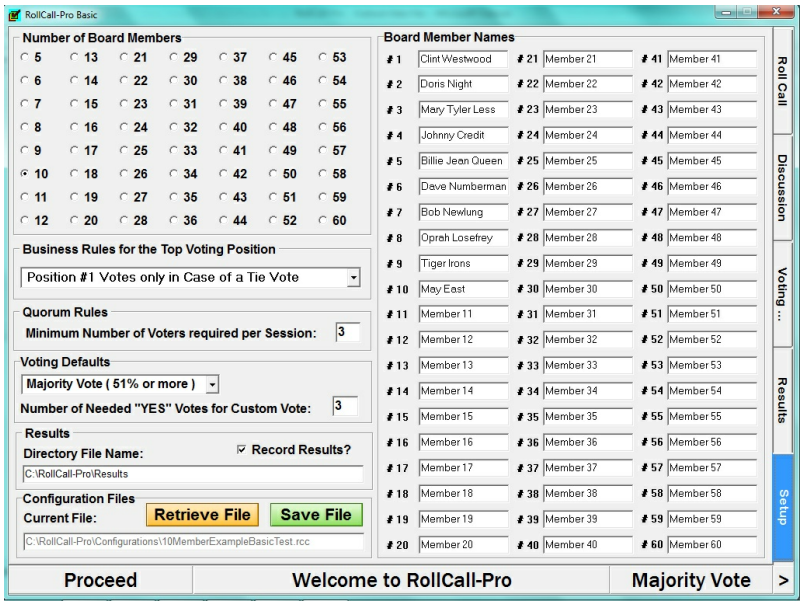

Figure 3-3. RollCall-Pro Setup Screen

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4.1 Number of Members

This is the Number of Voting Member panels that you wish to display on the RollCall-Pro Display Screen. Select the number of members to display on the screen by clicking the radio button next to the desired number:

Figure 3-4. Set the Number of Voting Members

4.2 First Voting Position

The Business Rules for "First Voting Position " are simply the rules that apply to the first name in the left hand column on the main display. This Member #1 position must be assigned to the Mayor, Chair or President, if they only vote in the case of a tie vote or if this is a non-voting position.

This position can hold one of three roles: 1) the official "Tie-Breaker" or 2) have the same Voting responsibility as every other member or 3) serve as a Non-Voting Member.

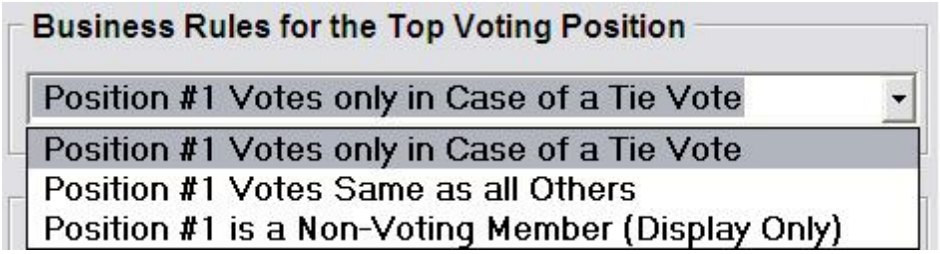
Business Rules for the Top Voting Position
Position #1 Votes only in Case of a Tie Vote
Position #1 Votes only in Case of a Tie Vote
Position #1 Votes Same as all Others
Position #1 is a Non-Voting Member (Display Only)

Figure 3-5. Defining the Role of the Top Voting Position

The first setting for this Top Voting Position is as the Tie-Breaker Position. This means that the position:

1. Only votes when a tie occurs,
2. Cannot "Abstain", and
3. Their voting display is "Not Required", unless there is a Tie Vote.

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This position is typically filled by the Mayor, Chairman or President of the Board.

The second choice for this position is acting as a "Normal" voter and voting along with everyone else on the issues. This position will NOT break ties. If a tie vote does occur, the display will simply show the vote as a tie. The Board would use its own Rules of Order to decide how the tie vote is resolved.

The last choice in this section is to display the name of the person in charge but not to give them any voting rights at all. For example, a City might have an Executive that is not allowed to vote on issues, but regularly sits with the rest of the council members and runs the meetings. In this case, the Executive's name would be displayed, but he would not allowed to vote on any items.

4.3 Minimum Number of Voters

This function allows the user to choose a minimum number of voters (Quorum) that must be present in order for the session to go forward. If this number of Members does not buzz-in during the initial Roll Call, the Voting System will not proceed. A notice will appear in the bottom center of the RollCall-Pro Display Screen indicating an insufficient number of Voters is Present to conduct official business. Likewise, if the number of Members "Present" in the meeting falls below this Quorum during the course of the meeting, the system will not allow a Roll Call Vote.

Figure 3-6. Set the Minimum # Members Present for the Meeting

4.4 Voting Defaults

This function allows the user to select a default voting criteria to use throughout a meeting.

Figure 3-6. Voting Defaults

The choices available for selection are "Majority Vote (51% or more)", "2/3 Vote (66% or more)", "3/4 Vote (75% or more)", "No Vote Required", and "Custom Vote (Enter a Number)".

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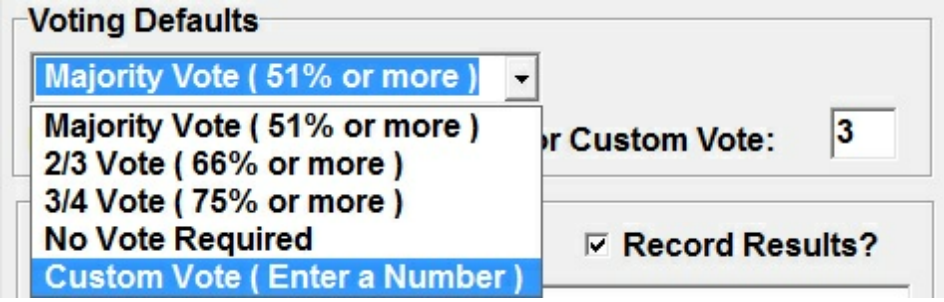
Voting Defaults
Majority Vote (51% or more)
Majority Vote (51% or more)
2/3 Vote (66% or more)
3/4 Vote (75% or more)
No Vote Required
Custom Vote (Enter a Number)
r Custom Vote:
3
Record Results?

Figure 3-8. Options for Voting Defaults

If you select "Custom Vote", you must also enter a specific number in the Custom Vote field.

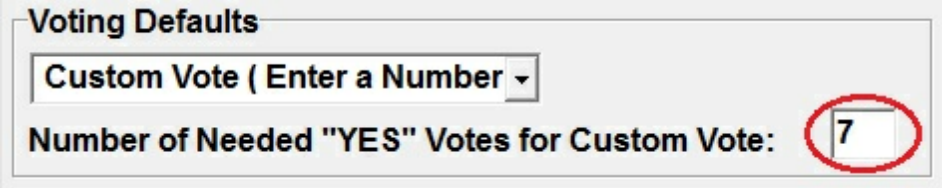

Figure 3-9. Number of Needed "YES" Votes for Custom Vote

4.5 Results

This Setup option allows you to choose whether to save the voting results and where they should be saved. The defaults are to save them as a text file in the Results sub-folder within the main RollCall-Pro Folder (the RollCall-Pro Installation process provides a Shortcut on your desktop to this Folder).

Figure 3-10 Option to save Results & Location Path

Note: If you wish to save the Results somewhere different than in the RollCall-Pro folder, like on the Network Server, you must specify the location path to where you want the Results saved. This is done in the **Directory File Name** *field on this screen:*

Figure 3-11 Path to directory where RCP Results are to be saved

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4.6 Save Custom Configuration

This Setup option allows you to retrieve a previously saved RollCall-Pro Configuration or to save a newly created or revised Configuration. To save a new, custom RollCall-Pro Configuration file, click on the "Save File" button. To retrieve a custom RollCall-Pro Configuration file, click on the "Retrieve File" button (shown below). You can save as many unique RollCall-Pro Configuration Files as you like in the RollCall-Pro folder.

Figure 3-12. Retrieve or Save new Configurations

Note: Again, if you want to save the RollCall-Pro software program and related configurations on the network server, you must specify the file location path to the RollCall-Pro folder and the Configuration folder on the Server.

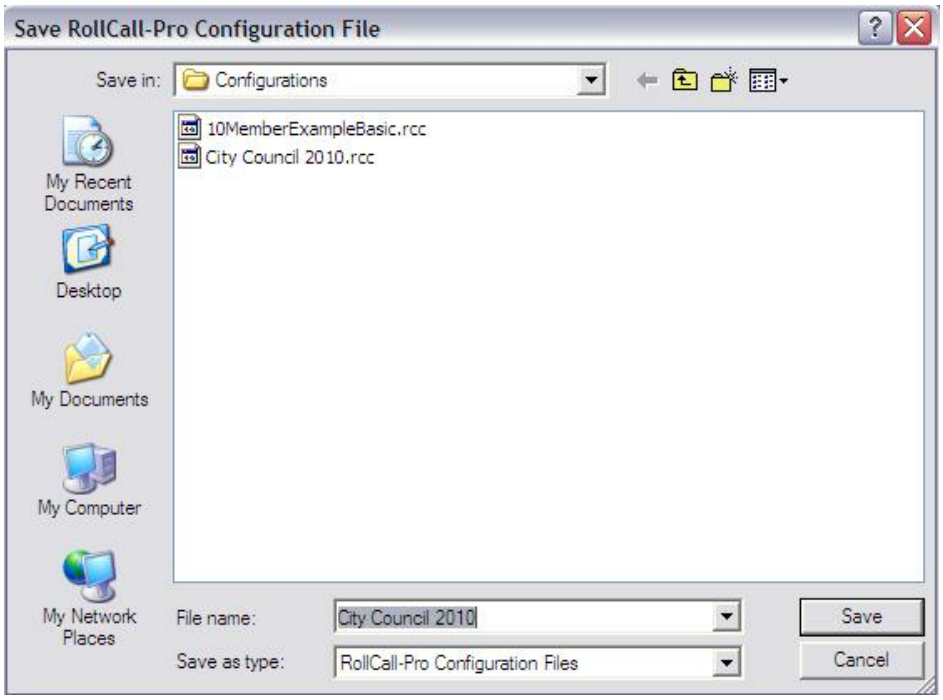

Figure 3-13. Save or Retrieve a Custom RollCall-Pro Configuration File

4.7 Name Assignments

The most important part of the customization process is the Name Assignments section.

This section "assigns" names to the display panels on the Discussion and Voting screens.

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This is accomplished by replacing "Member X" with the name of one of your Voting Members.

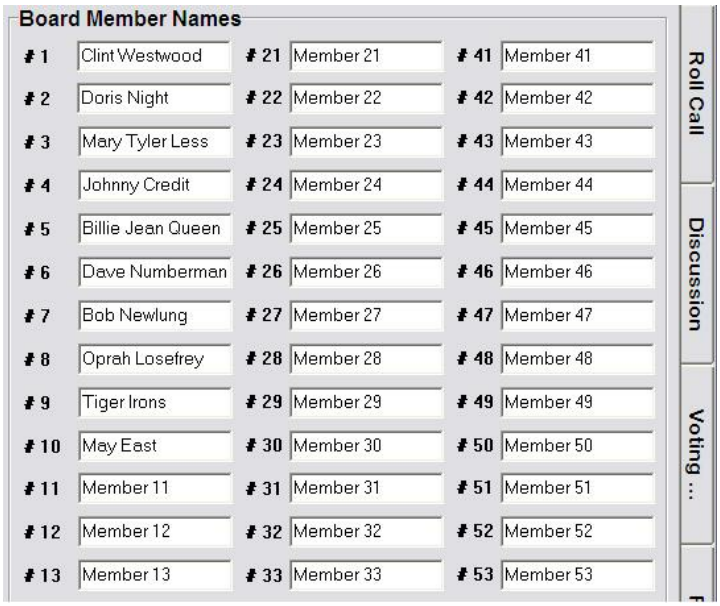

Figure 3-14. Enter the Names of Members

You can enter Voting Members' names by clicking on the Member # box and typing the name in place of the "Member #". Move to the next box with the keyboard "Tab" key.

It is useful to number the Voting Members, perhaps by District # represented or by their seating position. **Each Member must use the Keypad # that is next to their Name** on this page. For example: Keypad #3 will always buzz-in to register votes for Member 3.

Keypads are physically numbered on the nose label and on the keypad insert:

Figure 3-15. Keypad/Voter Numbers

Special Note: If the Mayor or Chair or President only votes in the case of a tie, they must always be assigned to Keypad #1, regardless of which District he/she represents. This Number 1 keypad is the only keypad that can be used to break a Tie Vote.

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4.8 Save Changes

When you have finished setting all the Setup options for your board or council, you should click the "Save File" button and save your new (or modified) configuration with an appropriate name.

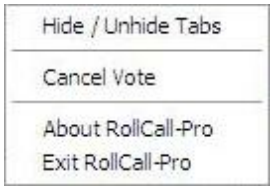
Special Note: With one exception, if you choose not to Save your changes, the new settings will be active during this session, but will not be active the next time this Configuration is used.

This does not apply to Quorum Rules. If you modify the Minimum Number of Voters after starting RollCall-Pro, you must:

1. Save the configuration file,
2. Exit RollCall-Pro, then
3. Re-launch RollCall-Pro.

5 Additional Menu Items

When you "*right mouse-click*" on the RollCall-Pro screen, you get a pop-up window of several options. So far we have discussed the "**Hide/Unhide Tabs**" function. In this section we will describe the other functions that are also available in this pop-up window:



5.1 Cancel the Current Vote

The "Cancel Vote" option is also available on the pop-up window when you "*right mouse-click*" anywhere on the RollCall-Pro Display Screen:

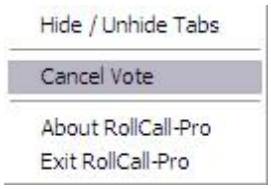


Figure 4-1. Cancel Vote Option

The "Cancel Vote" option only works in the middle of a voting session before all the votes are locked in/confirmed and disclosed. Click on the Right Mouse button, and the menu in Figure 4.4 will appear. Left Click on the "Cancel Vote" menu item, and then the system will ask you to confirm your cancellation:

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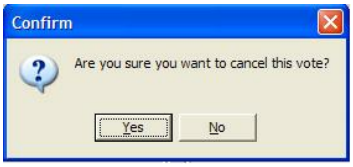

Figure 4-2. Are you sure?

For example, if you are voting on "Item 5", and after the voting has started, but not been completed, you might wish to cancel the vote for some reason, e.g., the Criteria to Pass is incorrect or another Voting Member enters the meeting and wishes to vote. To cancel the vote, simply right click on the screen and select the "Cancel Vote" menu item, then click "Yes" in the pop-up confirmation window (above). The voting session will return to the Discussion of Item 5.

5.2 About RollCall-Pro

The "About RollCall-Pro" screen is also available from the "*right mouse-click*" anywhere on the RollCall-Pro Display Screen. This window provides additional information about the installed version of RollCall-Pro System that you have:

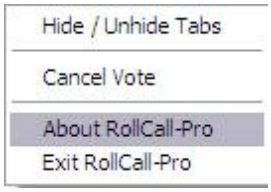

Figure 4-3. Accessing About RollCall-Pro

The following figure shows the RollCall-Pro Basic System "About RollCall-Pro" box:

RollCall-Pro Basic
Roll Call-Pro
The Wireless System
RollCall-Pro: Basic
Version 3.0d
Copyright 2007
RollCall-Pro was developed by Current Works, Inc.
Help for RollCall-Pro can be found in the two RollCall-Pro Manuals located on the RollCall-Pro CD or in the installed Documentation directory
The latest available information about the RollCall-Pro System, including the two RollCall-Pro Manuals, can be found at the website: www.rollcallpro.com
Close

Figure 4-4. About RollCall-Pro Box for Version 3.0

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5.3 Exiting RollCall-Pro

When you are finished working with the RollCall-Pro System you can exit the program from the same pop-up "*right-mouse click*" window. This method of exiting the program provides some protections from accidental closure and from closing before Voting Results are saved.

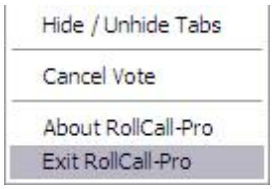

Figure 4-5. Exiting RollCall-Pro

After choosing the Exit option, the next popup asks if you really want to Exit the program, just in case this was an accidental choice:

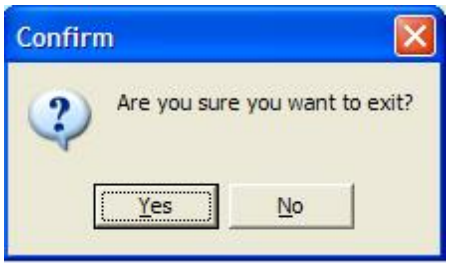

Figure 4-6. Exit Confirmation

Also, if there is a Roll Call voting result that has not yet been saved in the Results folder, another Popup screen will direct you to click "Proceed" to save these voting Results before exiting the program:

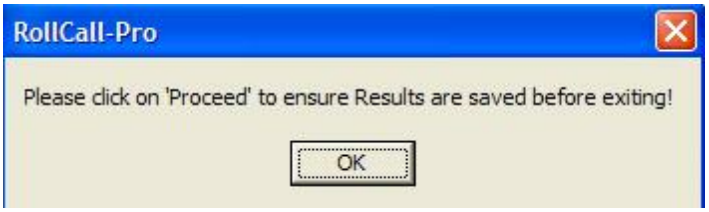

Figure 4-7. If the Last Voting Results have not been Saved, you cannot Exit.

When you Exit the program in this manner the "Time the Meeting Ended" is time also stamped in the Results document.

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6 Customer Service

This RollCall-Pro **Installation and Setup Manual** is intended to provide guidance to prepare your system for the meeting.

The RollCall-Pro **Operator's Manual** is intended to provide guidance in the use of this system in running the meeting.

The **SideKeys User's Manual** is intended to provide guidance in the use of the wireless keypads in this system.

If you have any need for additional assistance in the use of these tools, please contact us.

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Website: **www.rollcallpro.com**

Customer Service available Monday-Friday 8:30am – 4:30pm Central Time.

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